

Certified Specialist in Planned Giving

A Professional Designation Program

The American Institute for Philanthropic Studies provides planned giving professionals and others who are involved in the planned giving process, with the knowledge and skills required to implement and maintain a successful gift planning program. The goal of the Institute is to set the standard for academic excellence, practical experience, and professional integrity in the field of Giving.

The Certified Specialist in Planned Giving

Fall 2024 Spring 2025 Course Schedule

Modules One Six

Module One

Module Four

Charitable Gifting Part One: Assets and Entities

Focus on foundations: private, public, supporting, and community; general tax rules, restrictions and limitations.

Charitable Gift Assets Types of classes, risks and benefits of each, and evaluation of assets and procedures for conveying title, ownership, and possession

Instructors: Stephanie Buckley & Elizabeth Bawden

Charitable Gifting Part Two: Other Deferred Gifting Techniques

Focus on design issues, valuation concerns, administration/operation, and obtaining tax deduction and benefits of both outright and deferred methods.

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Faculty